



# Health Care Plan Pt.2 - Using the HCP

New Feature Documentation

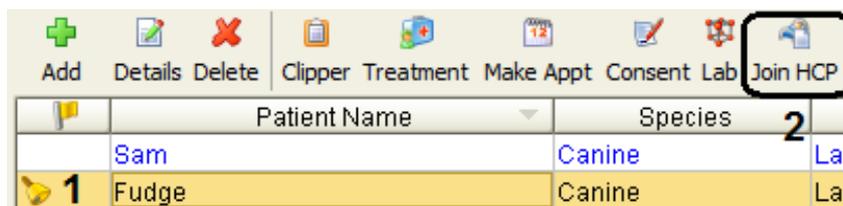
## What does it do?

One of the main objectives of the New Health Care Plan is to simplify the work flow to increase productivity of the vet in the consult room with their limited time per animal. This is achieved by incorporating the HCP module into the main treatment screen, automatically discounting and dispensing items from the plan without using a separate treatment screen in order to save time and money for the practice and client.

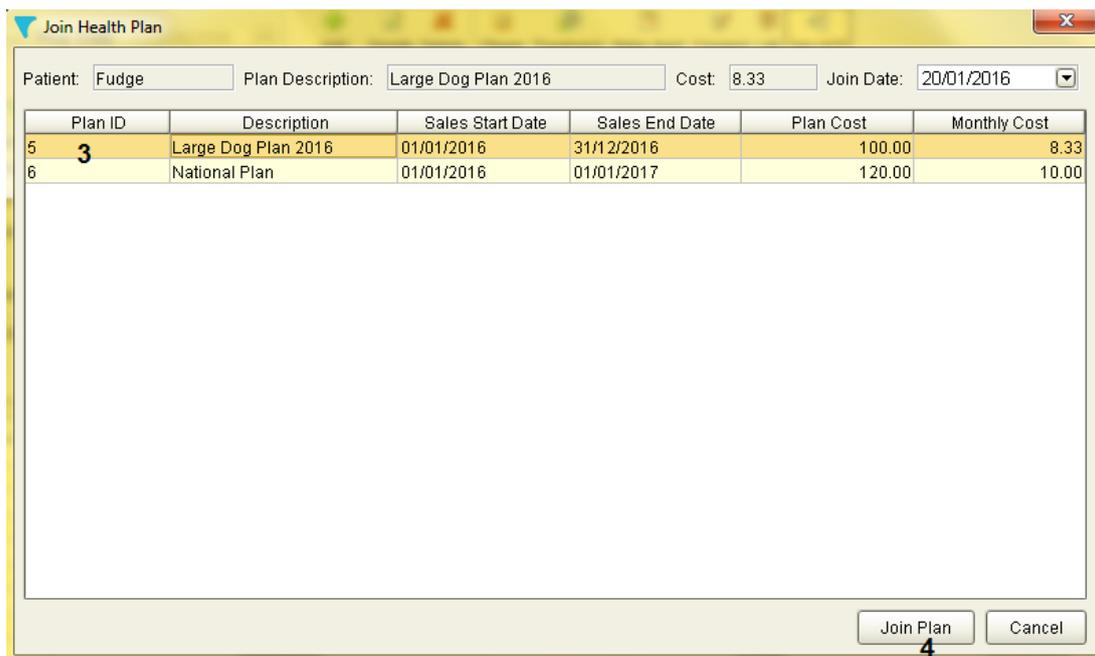
## How do I use it?

### Joining a Health Care Plan

To add a patient to the Health Care Plan, select the patient from the patient grid (1) in the reception screen and press the 'Join HCP' button (2).



The following screen will display all available plans for the selected patient based on the species. Select the required plan (3) and click the 'Join' button (4).



The patient will now show highlighted in green on the patient grid.

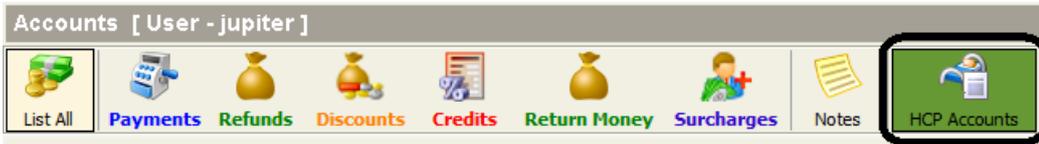


	Patient Name	Species	Breed	Gender	DOB	Id	%	
	Fudge	Canine	Labrador Retriever	Female	01/01/2001	53188	100.00	✓
	Sam	Canine	Labrador	Male	01/07/2009	865918	100.00	✓

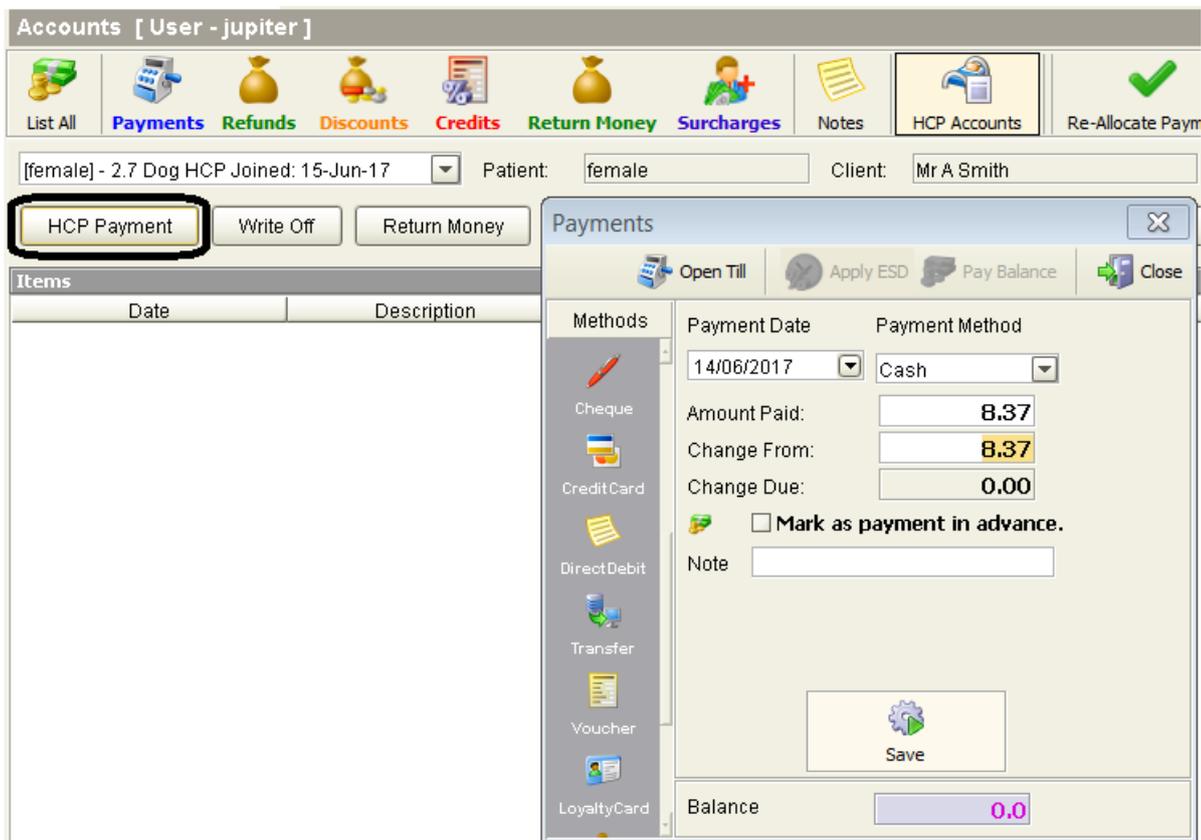
The patient is now part of the selected plan and the initial payment needs to be taken. All subsequent payments will be by Direct Debit.

# Taking the Initial Payment

To take the initial payment we need to enter the HCP Accounts screen.  
Select the patient from Reception and Enter the Accounts screen for that Client.  
Once you have entered the Accounts screen, select 'HCP Accounts'.



You will then be given the option to 'Process First Payment'. This will load the normal Payments screen for you to take the payment.



Continue to use the system as normal. The system will automatically discount items according to how your plans have been set up. The discounts will automatically display on your treatment draft screen when dispensing items. An example of this is shown in the screenshot below.

Date	Patient	Docket	Description	Qty	Net	VAT	Total	Surgeon
08/01/2016	Fudge		Consultation 1	1.00	22.07	4.41	26.48	T Reeves
08/01/2016	Fudge		Consultation 1 (Discount)	1.00	-22.07	-4.41	-26.48	T Reeves

Once you have Saved your Treatments, the items are saved onto Treatment History and are highlighted in green to distinguish them as Health Care Plan Sales.

Date	Time	Description	Qty	Total	Surgeon	Docket	Site
08/01/2016	14:57	Consultation 1	1.00	26.48	T Reeves		Esher
		Consultation 1 (Discount)	1.00	-26.48	T Reeves		Esher

The discount is also shown on the Accounts screen.

08/01/2016	1009509	08/01/2016 14:57	Consultation 1	T Reeves	0.00	1.00	22.07	4.41	26.48	26.48	Fudge	Esher	Treatment
08/01/2016	1009509	08/01/2016 14:57	Consultation 1 (Discount)	T Reeves	0.00		-22.07	-4.41	-26.48	0.00	Fudge	Esher	Discount

## Health Plan Overview

The HCP Treatments tab has been introduced to the Treatment Screen. This screen will show you what the plan consists of, how many items have been used and how many items are available.

Description	Discount Percentage	Number Available	Used
Consultations	100.0	4.0	1.0
Counter items	10.0	999.0	0.0
Diets	10.0	999.0	0.0
Oral Medication	100.0	15.0	0.0
Vaccinations	100.0	5.0	0.0

## Cashing up HCP Payments

Health Care Plan financial transactions are separated from normal transactions. Therefore, when running daily cash, you have three different filter options under the filter 'Account Type' highlighted below.

Daily Cash [ User - jupiter ]

Print Detailed Print Summary Print Payment Type Refresh Export

Daily Cash Cashing Up

From: 18/01/2016 00:00:00 To: 18/01/2016 19:55:38 Payment Type: [All] Client Category: [All] Work (Payment) Site: Esher Client Site: All

Register Last Date Start From Last Run Cash book history Account Type: **HCP**

	Date	Client	Address	Cash	Cheque	Debit Card	Credit Card	Voucher	Other
	18/01/2016 00:00	Adamson, R	Harepath Road	0.00	0.00	0.00	0.00	0.00	0

If this is set to 'All' all financial transactions will display, both HCP transactions and Non-HCP.

To run Non HCP transactions only select 'Non HCP'.

To run for HCP transactions only, select 'HCP'.